

# Case Study

## Funeral Partners

Power Apps and Power  
Platform Implementation



### Company and Project Introduction

Founded in 2007, Funeral Partners is the third-largest funeral company in the UK with 230 branches and continues to expand through acquisition and the opening of new branches.

Their mission is to deliver funerals that communities and families can all be proud of. To achieve this goal, Funeral Partners provide exemplary care to the families they serve and deliver the highest standard of service. Through offering a sensitive, professional service to families and being a forward-thinking, open-minded organisation, Funeral Partners are leading the way in setting new standards of excellence within the profession.

As Funeral Partners have rapidly grown, they have acquired and attracted independent funeral homes throughout the country. Funeral Partners' commitment to retaining a funeral home's heritage and reputation within its local community has led to many acquisitions as they oversee over 22,000 funerals annually.

To help manage Funeral Partners' mergers and acquisitions, Strategy 365 was engaged to create a system which could manage the pipeline of their purchase opportunities of independent funeral homes and all activity relating to the mergers and acquisitions.

Website: <https://www.funeralpartners.co.uk/>



**1000<sup>+</sup>** Staff  
Company size



**20** Users  
Solution size

### Solution Components

- Microsoft Power Apps
- Microsoft Power Automate
  - Microsoft Power BI
  - Microsoft Licensing
- Power Platform Support Services

## Project Summary

The initial phase of the project was to implement Microsoft Power Apps which the solution was built upon. Analysis from Strategy 365 showed that Funeral Partners would not benefit from the full capabilities of Dynamics 365 Sales. Therefore, a more suitable model-driven Power App was built as it provided Funeral Partners a significant price reduction for their licences.

The solution component built within the model-driven app ensured Funeral Partners can identify potential acquisition or merger opportunities of independent funeral homes. Also, users can track the progress of a potential acquisition as each aspect in the process of a purchasing a funeral home is now recorded:

- Contains details about independent funeral homes such as director, address, number of branches and more
- Records any activity with each independent funeral home such as email or letter communications
- Maps out Funeral Partners' purchasing process from first opportunity to buy, initial dialogue, valuation, deal negotiation, exclusivity and finally completion
- Allows users to analyse the history of each stage to see the time it is taking to be completed
- Integration of Power BI to produce detailed reports and dashboards

Funeral Partners traditionally use written letters to communicate with potential partners. Previously, there was no record of which letters were being sent out to which independent funeral home; in the second phase of the project, Strategy 365 resolved this issue through building a marketing functionality within the model-driven app.

This functionality allows users to easily generate bulk letter runs using automated cloud flows. The response to each letter can now be recorded by a user within the model-driven app and therefore Funeral Partners can analyse the effectiveness of their marketing campaigns, including which letters led to opportunities.

## Key Deliverables

- Acquisition and merger process management
- Simple to use system for users
- Model-driven Power Apps solution
- Marketing function within the Power App
- Detailed reporting functionality using Power BI

## Benefits

Funeral Partners having a single system for their day-to-day management of their mergers and acquisitions of independent funeral homes has brought many benefits:

- Consolidated all data of potential partners within Microsoft Power Apps
- Tracks and records outcomes of letters allowing Funeral Partners to identify which content led to opportunities to buy
- Ensures users follow the pre-defined purchasing process of a independent funeral home
- Detailed reporting using Power BI to highlight trends

*"What Strategy 365 have built us has exceeded our expectations."*

James Croshaw, Acquisitions Associate, Funeral Partners